

Word Templates

Installation Manual

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Working with Word Templates

The document named *filename.dot* (substitute the name of your template here) is a Microsoft Word template file. The template is customized and can include unique text, macros, toolbars, and styles. All of these elements are automatically available when the template is used. When the template is used, a new document is opened into a new document window. This document is opened without a name; you will be prompted to name the file when it is saved, or when you click **File, Save**.

When you use a template, its unique features remain only while you are editing the particular document associated with it. If you close that document, or quit and then restart Word, the unique features of your template will not be available.

Installing the Template(s)

To install your template(s), first determine the location of the template directories. Then copy your template(s) and optional accompanying files into one of the default template directories. After installation, the templates will automatically appear when you select **File, New**.

Procedures

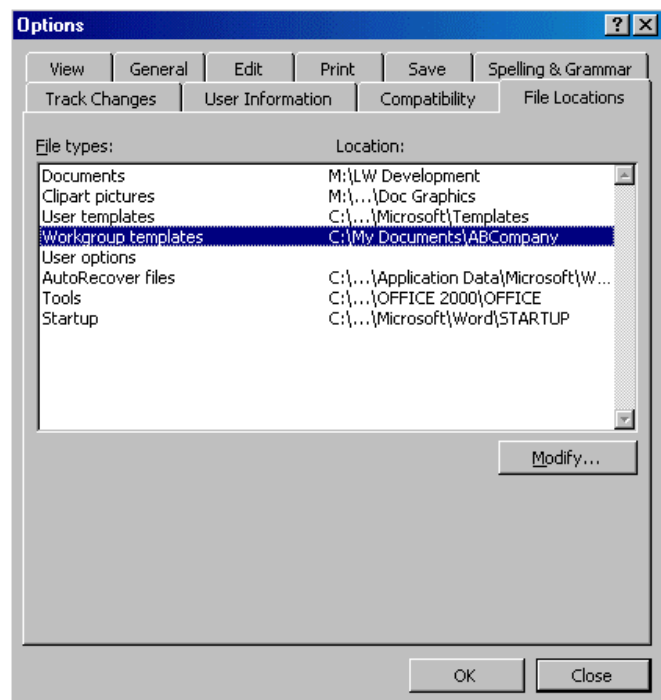
1. In Word, click **Tools, Options**.
2. Click on the **File Locations** tab.

The File Locations tab includes two template directories: User templates and Workgroup templates. While either of these directories can be used, the Workgroup templates directory is recommended for custom-developed templates.

3. Note the location of the Workgroup templates.
4. Click **Close**.
5. Copy the template(s) and optional accompanying file(s) to the Workgroup templates directory.

Comments/Prompts

The Options dialog box is made up of several tabs that control default settings.



Setting Macro Security Levels

Microsoft Word 2000 offers three levels of security – high, medium and low – to reduce the chances that macro viruses will infect your documents, templates or add-ins. You can change the security level at any time as you work. Templates developed by Leewood Associates contain macros. However, if the security level is set to high, the template will not run. To ensure you can run your Leewood templates, we recommend that you set your Word security level to medium. After you change the security level, you will be asked if you want to run the macros in the template.

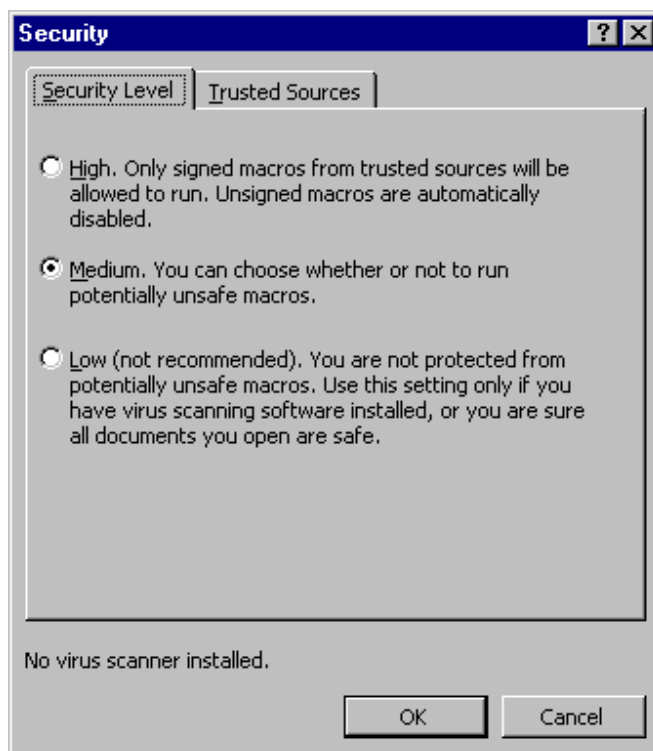
Microsoft Word 97 does not have macro security settings.

Procedures

Comments/Prompts

1. In Word, click **Tools, Macro, Security...**
2. Click the Security Level tab and select the Medium option button.

The Security dialog box is made up of two tabs that control security settings.



3. Click **OK**.

Creating a New Document Based on your Template

The template is a shell document that may contain standard information to be included in each document and tools, such as styles, autotext, macros and toolbars, to help you format. Once a template is accessed, by selecting **File, New**, the document information is opened into a new, unnamed document. You will be prompted to name the document when it is saved, or when you select **File, Save**.

Wizards are also templates. A wizard differs from a typical template in that it has a initial dialog box with a series of questions and options from which you choose. It is basically a more complicated and involved macro. The wizard also provides a help assistant to guide you through the wizard if necessary.

Procedures

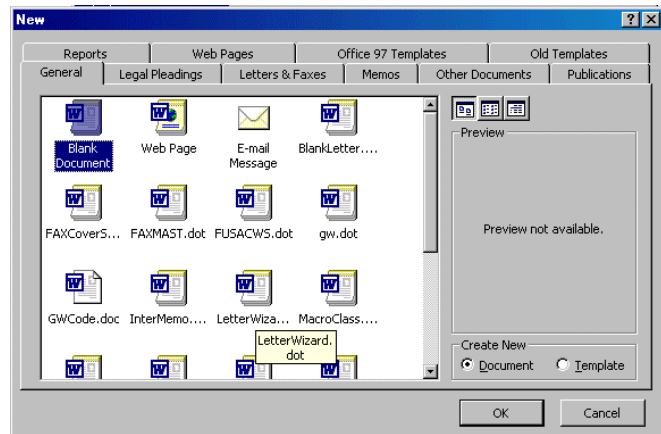
1. Click **File, New**.

Click on your template name (*filename.dot*) and click **OK**.

Note: Alternatively, double-click on *filename.dot*.

2. There may be an initial dialog box when you access the template. Follow the prompts to complete the information in the text boxes. Press the **Tab** key to move to subsequent text boxes. When you have completed typing the information, click **OK** or **Finish** to see the completed document.

Comments/Prompts



The New dialog box lists all the templates that are shipped with Word and any templates copied into the Template directory.

The document is formatted to include the information you entered using this template. Your insertion point is placed at the beginning of the body of your document.

Procedures

Comments/Prompts

3. After you type the body of the document, click **File**, **Save** to save the document. You will be prompted to name your document at this time.